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WEEDING POLICY AND PROCEDURES:
DEFENCE RESEARCH ESTABLISHMENT SUFFIELD
INFORMATION SERVICES

by

J.G. Currie and A.M. Dickason



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Weeding Policy and Procedures: Defence Research
Establishment Suffield Information Services

J.G. Currie & A.M. Dickason

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ABSTRACT

This guide states the policy concerning the weeding of material from the DRES libraries. Specific procedures to be followed for the weeding of monographs, periodicals, Sci-Tech reports and government documents are stated. A bibliography is included. *CHANDLER*

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Introduction

The Defence Research Establishment Suffield (DRES) is one of six research faculties within the command structure of the Chief Research and Development (CRAD), Department of National Defence. Information services at DRES consist of two physically separate library collections: a reference library which contains approximately 25,000 monographs and 247 current periodicals; and a document library which contains approximately 50,000 technical and defence documents. As the document collection contains some classified defence material, it is a closed stack library.

The DRES libraries provide services for over 200 scientific and technical staff and contractors who are engaged in 22 fields of study.

Goal of DRES libraries

The goal of the libraries is to meet the information needs of the staff in support of the research program. This is done by:

- a) accessing information, whether held or not;
- b) retrieving information, whether held or not;
- c) developing and maintaining the collection in accordance with the needs of the research program;
- d) developing and maintaining services and procedures to the optimum level of performance;

To help achieve this goal the DRES libraries have a collection development policy, published in 1983 as Suffield Miscellaneous Publication 113 (SMP113). It discusses the rationale, responsibility and general guidelines for selection. It also includes a detailed breakdown of the collection levels by subject, ranging from level I (intensive) to level IV (in abeyance).

The Objective of the Weeding Policy

The objective of the weeding policy is to establish a set of criteria and procedures in order to allow for the continual weeding or deselection of material from the library collection so that optimum use is made of the remaining items. Items included in this policy are; monographs, serials, periodicals and documents.

Reason for Weeding

The sole reason for weeding is to ensure that all material in the collection is relevant to the research program. To do this the "noise" or inappropriate material must be removed from both the shelves and the catalogue.

There are no valid philosophic or operational reasons for not weeding a scientific special library.

General Methodology

The life of an item in the DRES collection is a linear process from selection to acquisition, to deselection to disposal. Weeding must therefore be done in conjunction with the collection policy (SMP113). The fact that an item "may be needed someday" is no reason for retention if DRES does not collect in that specific field.

Each item is to undergo an individual physical examination. A book entitled Of Urfs and Orfs may not seem a likely candidate for the collection, but an examination shows that the book is not only current but deals with analyzing DNA sequences and is therefore a good choice for present retention.

The library staff will have a team of subject specialists available to advise on the worth or value of an item. The subject specialists will advise on trends in program emphasis and development. It should be stated here that the subject specialists are advisors only. All decisions to retain or weed an item remain the responsibility of the librarian working in conjunction with the Head/Information Services.

The subject specialities are listed in Annex A.

Monographs

DRES has a relatively small monograph collection, consisting of approximately 25,000 books. The predominant interest of users is for the most recently published information whether it is in book, journal article or document form. DRES had been in operation for nearly fifty years without a weeding policy. As a result, the present monograph collection holds much outdated material.

It is not the aim of the reference library to develop a core collection. The collection development policy states that only monographs dealing with the history of Chemical or Biological Warfare are collected exhaustively at Level I (SMP113).

The following are the guidelines for the weeding of the monographs:

1) Superceeded editions, including yearbooks, almanacs, directories and encyclopedias can be weeded immediately.

2) All other monographs are reviewed on a title by title basis. Items to be weeded are books that:

- a) contain outdated or incorrect information;
- b) are not relevant to the DRES program;
- c) Have not circulated for 10 years or more.

The procedure is as follows:

1) Those monographs not out in circulation will be visually inspected by the librarian. All books out on circulation will be recalled and reviewed in conjunction with the holder.

2) The initial candidates for weeding will be identified by putting a red dot on the spine of the book.

3) The preliminary weeding decision will then be reviewed with the appropriate subject specialist. After considering the specialists advice, the librarian will make the final decision on weeding or retention.

4) Weeded items will be moved to the discard shelves in the library workroom. They are to be stripped of their book pockets and cards and stamped "DISCARD" over the accession stamp. All records are to be removed from the catalogue.

5) After the books have been stamped they may be claimed by DRES employees. Those that are not claimed after a reasonable time may be:

- a) offered to Medicine Hat College;
- b) sent to the Canadian Book Exchange;
- c) offered to Universities via ENVOYPOST.

Documents

Documents are considerably different from monographs or journals. They usually represent either a short scientific note or communication on a very specific topic or they are organizational/administrative documents that are relevant only for a very short period of time.

In either case they are transient and flood the system. In the years 1985 to 1988 DRES received 1236, 1425, 1683 and 2086 documents consecutively. Most of these were sent to DRES on automatic circulation and less than 1/3 were catalogued and retained in the collection. Even so the DRES document collection has grown by an average of 807 documents a year in the past 4 years.

Documents are often accountable items. According to the policies laid out in Canadian Forces Administrative Order (CFAO) 57-11 all documents are to be released to DRES by one of the following 3 offices:

National Defence Records Management Services for NATO documents;

The Canadian National Leader for TTCP documents;

Director/Scientific Information Services (DSIS) for everything else.

Most documents can be destroyed by the establishment but some must be returned to the originator. Documents that must be returned are clearly marked. Classified material must be destroyed in accordance with the Security Orders for the Department of National Defence (Chap 14).

The weeding process for the documents has two distinct parts: the decision to retain or weed and the disposal of the item. The first step is to determine if the item has been published by DRES. If so it will never be weeded. If it is from another source the following steps will be taken:

- 1) Examine the item.
- 2) Is the subject listed in the Collection Policy (SMP113)?
If no, weed; if yes, continue.
- 3) Is the item one that we collect exhaustively (Level 1)? If
yes, retain; if no, continue.
- 4) Is it still relevant to the program? If yes, retain; if
no, weed. The subject specialists may be contacted at this point to
help determine the relevance of an item.

At this point only those items collected exhaustively or which are
relevant to the program will remain in the collection. For weeded
documents the following steps must be taken:

- 1) Is there a disposal limitation on the document such as
"Return to Originator for Disposal"? If yes, it must be actioned
accordingly.
- 2) Is the DSIS accession stamp on the document? An example
of the stamp is shown in Figure 1. If the stamp signifies that DSIS
received only 1 or 2 copies of the item it is to be returned to DSIS.
If there is no DSIS accession stamp, it must be assumed that DSIS does
not have a copy and the item is to be sent there. If there are
multiple copies of the item in DSIS, it may be disposed of in
accordance with DND Security Regulations.
- 3) All Canadian Forces Publications (CFP) and microfiche may
be disposed of without going to DSIS.
4. Once the item has been weeded all record of it must be
removed from the catalogue.

PERIODICALS

The worth and currency of a journal varies not just from title to title but also from volume to volume. The weeding of periodicals is the most vital as journals are space intensive, labour intensive and expensive.

The general guidelines for the weeding of periodicals are as follows:

1. There are no core journals.
2. Retention dates are to be determined individually for each title. The dates will normally range from 1 to 20 years. The aid of the subject specialists should be enlisted for this step.
3. Cancellation of a subscription does not mean that the journal will be removed from the collection. A journal may change its focus but that may not effect the worth of its previous volumes. A journal will be kept on the shelf for one full year after its cancellation before it's retention period is determined.
4. When a journal has been identified for weeding its known users will be notified by memo and they shall have a right of reply. The final decision, after reviewing all advice, rests with the librarian.

After a journal has been weeded there are five alternatives to disposal:

- 1) offer it to DRES employees
- 2) offer it to the Medicine Hat College
- 3) offer it to takers via ENVOYPOST
- 4) send it to the Canadian Book Exchange

Those portions of the journal that have been weeded will be removed from the next edition of the Periodical Guide.

Conclusion

Weeding must be an ongoing project in a special library. While circumstances and criteria may change the procedures described in this manual should remain valid. Careful and consistent application of the actions described should help achieve the goal of ensuring that the collection offers the maximum usage and satisfaction from the resources at hand.

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DSIS Accession Stamp
NATIONAL ARCHIVE HEADQUARTERS
OTTAWA, ONTARIO
K1A 0S2

RETURN THIS DOCUMENT

DSIS Accession Stamp

Figure 1

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ANNEX A

Subject Specialties

Administration/Management
Aerodynamics/Aerospace
Analytical Chemistry
Computers
Electronic Engineering
Electronic Technology
Environmental Issues
Finance
Mathematics and Statistics
Medicine
Meteorology
Microbiology/Public Health
Military Science/Technology
Nuclear Sciences
Organic Chemistry
Pharmacology and Medicine
Physics
Physical Chemistry
Radar
Toxicology
Optics/Lasers
Vehicle Engineering

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1. ORIGINATOR (the name and address of the organization preparing the document. Organizations for whom the document was prepared, e.g. Establishment sponsoring a contractor's report, or tasking agency, are entered in section 8.) DRESuffield		2. SECURITY CLASSIFICATION (overall security classification of the document including special warning terms if applicable) UNCLASSIFIED	
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4. AUTHORS (Last name, first name, middle initial. If military, show rank, e.g. Doe, Maj. John E.) CURRIE, JOHN G & DICKASON, ANNE M			
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This guide states the policy concerning the weeding of material from the DRES libraries. Specific procedures to be followed for the weeding of monographs, periodicals, Sci-Tech reports and government documents are stated. A bibliography is included.

14. KEYWORDS, DESCRIPTORS or IDENTIFIERS (technically meaningful terms or short phrases that characterize a document and could be helpful in cataloguing the document. They should be selected so that no security classification is required. Identifiers, such as equipment model designation, trade name, military project code name, geographic location may also be included. If possible keywords should be selected from a published thesaurus, e.g. Thesaurus of Engineering and Scientific Terms (TEST) and that thesaurus-identified. If it is not possible to select indexing terms which are Unclassified, the classification of each should be indicated as with the title.)

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